

# Catholic Legacy Foundation of Acadiana

## Job Description

**Position Title:** Office Manager and Bookkeeper

**Reports To:** Executive Director

**FLSA Status:** Non-Exempt, Full Time

### JOB SUMMARY

The Office Manager provides operational and bookkeeping support to enhance the functionality of the Catholic Legacy Foundation of Acadiana (CLFA). The Office Manager serves as the administrative backbone of the organization, supporting leadership, managing office systems, providing bookkeeping services and safeguarding financial documentation, while ensuring a clear separation of duties between internal operations and outsourced accounting services. The Office Manager is responsible for the efficient day-to-day operations of the Foundation.

The successful candidate will ensure accountability to donors through accurate gift processing and timely gift acknowledgement, maintenance of the CRM database and respectful interactions with all customers. This Manager should have knowledge of and passion for the Catholic Church and its teachings.

This role does not perform formal accounting functions; instead, it supports and coordinates with the Foundation's contracted accountant by maintaining accurate records, processing routine transactions, and preparing information for review.

### ESSENTIAL DUTIES AND RESPONSIBILITIES

#### Office Administration & Operations

- Manage daily office operations to ensure a professional, efficient, and welcoming environment.
- Serve as the primary point of contact for phone calls, emails, visitors, and general inquiries.
- Maintain office systems, records, and filing (digital and physical), ensuring confidentiality and compliance.
- Order office supplies and manage vendor relationships.
- Coordinate meetings, prepare agendas, take minutes as needed, and assist with board and committee logistics.
- Support the Executive Director and staff with administrative tasks and special projects.
- Assist with preparation of reports, correspondence, and presentations.

#### Light Bookkeeping & Financial Coordination (Non-Accounting Role)

- Perform basic bookkeeping tasks, including data entry and coding of routine financial transactions.
- Process accounts payable and receivable for review by the Foundation's external accounting service.

- Prepare deposits, including donations and other receipts, ensuring proper documentation.
- Maintain organized financial records and supporting documentation for all transactions.
- Reconcile bank accounts monthly and provide reports to the external accountant, as requested.
- Serve as the primary liaison with the Foundation's contracted accounting and payroll service providers.
- Assist in preparing internal financial summaries for management and board review.
- Support the annual audit by assembling requested documentation and serving as a liaison with auditors.
- Follow established financial policies, internal controls, and nonprofit best practices.

### **Donor & Fund Support**

- Assist with gift processing, acknowledgments, and donor record maintenance.
- Coordinate with staff to ensure timely and accurate donor communications.
- Maintain financial documentation related to restricted, endowed, and custodial funds.

### **Compliance & Records Management**

- Maintain corporate records, contracts, and compliance documentation.
- Assist with insurance renewals, licenses, and required filings.
- Support adherence to nonprofit, legal, and ethical standards.

## **SUPERVISORY RESPONSIBILITIES**

This position does not include supervisory responsibilities.

## **JOB SCOPE**

Position encounters variations in work situations and questions.  
Incumbent operates under general directions and instructions and determines own practices and procedures not in conflict with existing policies, performing with minimal supervision.  
Contacts are made both inside and outside the CLFA office.  
Contacts frequently contain confidential and sensitive matters.

## **SPECIFIC JOB SKILLS**

- Clear understanding of role boundaries between internal bookkeeping support and outsourced accounting functions.
- Ability to work independently and collaboratively in a small office environment.
- Proficiency in office operations and Microsoft Office Suite (Word, Excel, Outlook, Powerpoint)
- Financial documentation accuracy
- Effective communication with external professionals, clergy and donors
- Attentive to detail, has a commitment to accuracy and able to produce high-quality work
- Exceptional written and verbal communication skills
- Excellent interpersonal skills and the capacity to successfully develop and manage authentic relationships
- Strong organizational and time-management skills
- Supportive and energetic attitude toward the Church, her teachings and her works

- Ability to manage and execute multiple tasks, prioritize and maintain confidentiality
- Must have a valid driver's license
- Complete diocesan Safe Environment Training, and a criminal background check

## EDUCATION AND EXPERIENCE

Associate's or Bachelor's degree in business administration, accounting, finance, or a related field preferred.

- Minimum of 3–5 years of experience in office management or administrative support and basic bookkeeping.
- Experience working alongside an external accounting or CPA firm preferred.
- Familiarity with accounting software (e.g., QuickBooks, Sage Intact or similar) and strong proficiency in Microsoft Office.

## PHYSICAL DEMANDS AND WORKING ENVIRONMENT

While performing the duties of this job, the employee is required to stand, walk, talk, reach, sit, hear, see, handle and perform repetitive motions of the hands and wrists, and must be able to lift or move up to 40 pounds. The employee is expected to work onsite with travel throughout the Acadiana region. The employee may have weekend or evening work for special events or meetings.

**The above statements describe the general nature and level of work of the position. They are not an exhaustive list of all responsibilities, duties and skills. The physical demands and work environment characteristics described are representative of the physical capabilities that must be met by an employee and the working conditions that an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.**

---

**Employee**

---

**Date**